

# Understanding Foreign Travel



## EETD Foreign Travel Training

Elijah Walker III – OCFO Travel Services

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# What is foreign travel?

**Approved travel (whether fully or partly on Official business) from the United States (including Alaska, Hawaii, the Commonwealths of Puerto Rico and the Northern Mariana Islands, and the territories and possessions of the United States) to a foreign country and return OR travel between foreign countries by persons, including foreign nationals, whose salaries and/or travel expenses will be ultimately funded in full or part by DOE/NNSA from its appropriations.**

**Official foreign travel also includes travel funded by non-DOE (work for others) sources for which the traveler represents DOE or conducts business on behalf of the U.S. Government.**



# Funding Sources



**Office of Electricity Delivery and Energy Reliability (OE)**



**Office of Energy Efficiency & Renewable Energy (EERE)**



**Office of Fossil Energy (FE)**



**Office of Science (SC) + Non-DOE/Work for Others**








**National Nuclear Security Administration (NA)**



# Funding Sources

- How do I know what DOE program office is being used for travel?

Project Information							Customize   Find   		First 	1 of 1 	Last
	Project	Primary	Percentage Split	B +R Classification	Project Org	MARS Code					
1	PAT052	<input checked="" type="checkbox"/>	100.00	KA1101020	PH	OPEXP					

**B+R Classification**



# Program Specific Guidance (OE)

**The DOE Office of Electricity Delivery and Energy Reliability has the following requirements before accepting a foreign travel request for review:**

- **Authorization is submitted 30 days prior to departure**
- **Provide previous OE Foreign Trip Report**
- **Provide conference/meeting agenda**
- **Provide name, phone number and email address of DOE Program Manager under the "Trip Comments" section in TREX**

**Please email supplemental documents to:**

**[Ewalker@lbl.gov](mailto:Ewalker@lbl.gov) and cc: [TravelPolicy@lbl.gov](mailto:TravelPolicy@lbl.gov)**

**Post foreign trip reports are required!**



# Program Specific Guidance (EE)

**The DOE Office of Energy Efficiency and Renewable Energy has the following requirements before accepting a foreign travel request for review:**

- **Authorization is submitted 30 days prior to departure (45 days depending on the EERE program funding travel)**
- **Provide previous EERE Foreign Trip Report**
- **Provide name, phone number and email address of DOE Program Manager under the "Trip Comments" section in TREX**

**Post foreign trip reports are required!**



# Program Specific Guidance (EE)

## Additional requirements within DOE's EERE Program

- **Conference/Meeting Agenda**
- **Presentation/Paper**
- **Daily Calendar/Summary of Events**
- **Letter of Invite from Host or DOE-HQ Program Manager**

**Please email supplemental documents to:**

**[Ewalker@lbl.gov](mailto:Ewalker@lbl.gov) and cc: [TravelPolicy@lbl.gov](mailto:TravelPolicy@lbl.gov)**



# Program Specific Guidance (EE)

**How do I know which EERE Program Office is APPROVING travel?**

- **DOE Program manager supporting travel**

**<http://phonebook.doe.gov>**

**Lafrance, P. Marc (Marc)**

Phone: 202-586-9142

Fax: 202-586-4617

Route Symbol: EE-2J

Building: LENF950

Location: WASHINGTON DC

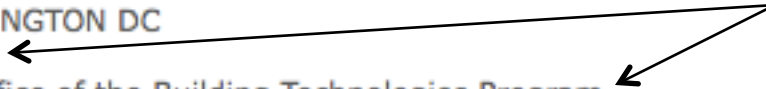
Routing: EE-2J

Organization: Office of the Building Technologies Program

Title: GENERAL ENGINEER

Internet Address: [marc.lafrance@ee.doe.gov](mailto:marc.lafrance@ee.doe.gov)

**Supporting program**



# Program Specific Guidance (FE)

The DOE Office of Fossil Energy has the following requirements before accepting a foreign travel request for review:

- **Must be submitted: 30 days in advance for non-sensitive travel; 45 days in advance for sensitive travel**
- **Complete a 5-Point Justification document**
- **Provide a detailed airline itinerary**
- **Provide PDF version of presentation/paper to be presented (if applicable)**
- **Provide Letter of Invite from host**
- **Provide name, phone number and email address of DOE Program Manager**
- **Provide copy of meeting agenda (if applicable)**



# Program Specific Guidance (FE)

Please email supplemental documents to:

[Ewalker@lbl.gov](mailto:Ewalker@lbl.gov) and cc: [TravelPolicy@lbl.gov](mailto:TravelPolicy@lbl.gov)

- Fossil Energy will not accept an incomplete request. If your request is submitted on-time, but *missing* documentation or detail, please prepare a Late Justification Waiver.
- Post foreign trip reports are required for this program office and must be submitted within 30 days of your return



# Program Specific Guidance (FE)

## How do I know which FE Program Office is APPROVING Travel?

- **Fossil Energy subject matters determine the approval routing.**

FE-22	FE-24	FE-26	FE-27	FE-30	FE-40
Fuel cells; SECA; Distributed Generation; Clean Coal Power Initiative CCPI; FutureGen; Oxygen Membrane Technology; Material Technology; Turbines Gasification; Integrated Gasification Combined Cycle IGCC; Combustion; Environmental Control Technology; Advanced Research	Carbon Sequestration (Geological) Hydrogen Membrane Technology; Coal Liquefaction; Coal Fuels	Planning & Environmental Analysis	Carbon Sequestration Leadership Forum	Oil and Gas	Strategic Petroleum Reserves



# Program Specific Guidance (SC)

The DOE Office of Science (OSC) has the following requirements before accepting a foreign travel request for Review:

- Authorization needs to be submitted 30 days prior to departure for travel to a non-sensitive location, 45 days prior for travel to a sensitive location, and 60 days prior for travel to a terrorist sponsoring country (T-4).
- Non-DOE travel authorizations require a 30 day submission

DOE Foreign Trip reports are *not* required for this program, however, *may* be requested by the U.S. Department of State when travel is to a sensitive or T-4 country.



# Program Specific Guidance (NNSA)

The National Nuclear Security Administration (NNSA or NA) has the following requirements before accepting a foreign travel request for review:

- Provide PDF version of presentation/paper to be presented (if applicable)
- Provide PDF version airline/rail itinerary
- Provide Letter of Invite from host
- Provide name, phone number and email address of DOE Program Manager in the TREX "Trip Comments" section

Please email supplemental documents to:

[Ewalker@lbl.gov](mailto:Ewalker@lbl.gov) and cc: [TravelPolicy@lbl.gov](mailto:TravelPolicy@lbl.gov)

Post foreign trip reports are required for this program office and must be submitted within 30 days of your return



# Program Specific Guidance (NNSA)

**How do I know which NNSA Program Office is APPROVING travel?**

- DOE Program manager supporting travel
- NNSA Subject matters

<http://phonebook.doe.gov>

**Carter, Regina M. (Regina Carter)**

Phone: 202-586-8648

Fax: (none given)

Route Symbol: NA-242

Building: LENF955

Location: WASHINGTON DC

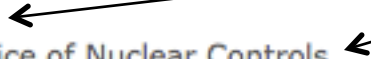
Routing: NA-242

Organization: Office of Nuclear Controls

Title: FOREIGN AFFAIRS SPECIALIST

Internet Address: [regina.carter@hq.doe.gov](mailto:regina.carter@hq.doe.gov)

**Supporting program**



# Foreign Authorizations in TREX

Itinerary Legs										Customize	Find	First	1-2 of 2	Last
Primary Information		Host Information		Conference		Foreign								
Departure Date	Departure City, State or City, Country	Arrival Date	Business City, State or City, Country	Host Name	Host Phone	Affiliated Institution	Hotel/Accommodations Name	Hotel / After Hours Phone						
1 12/01/2010	VACAVILLE, CA	12/01/2010	TOKYO CITY, JPN	In country	In Country	In Country	Local Hotel/GuestHouse	Phone	+	-				
2 12/07/2010	TOKYO CITY, JPN	12/07/2010	VACAVILLE, CA						+	-				

Itinerary Legs										Customize	Find	First	1-2 of 2	Last
Primary Information		Host Information		Conference		Foreign								
Departure Date	Departure City, State or City, Country	Arrival Date	Business City, State or City, Country	Conference Name	Conference Role	Conference URL								
1 12/01/2010	VACAVILLE, CA	12/01/2010	TOKYO CITY, JPN	Event Name	Event Role	www.conference.com	+	-						
2 12/07/2010	TOKYO CITY, JPN	12/07/2010	VACAVILLE, CA				+	-						

Itinerary Legs										Customize	Find	First	1-2 of 2	Last
Primary Information		Host Information		Conference		Foreign								
Departure Date	Departure City, State or City, Country	Arrival Date	Business City, State or City, Country	Purpose										
1 12/01/2010	VACAVILLE, CA	12/01/2010	TOKYO CITY, JPN	Activities to be conducted. Min 650 char, max 1500 char	+	-								
2 12/07/2010	TOKYO CITY, JPN	12/07/2010	VACAVILLE, CA		+	-								





# Foreign Authorizations in TREX

▼ Travel Authorization Estimate

M&IE	1,475.50	+ Lodging	1,506.00	+ Misc	<input type="text" value="500.00"/>	= Total Non-Air	3,481.50
						Total Air	<input type="text" value="1,200.00"/>
Paid By Others (Informational Only)		<input type="text"/>	Update Estimated Costs				
						Total Amount	4,681.50

Please document any costs paid or to be paid by another institution by using the "Paid By Others" box. Please provide the name of funding institution in the "Trip Comments" section.



# Foreign Authorizations in TREX

Elijah Walker III

Employee ID: 003583

Travel Auth ID: NEXT

## General Information

Trip Name: FTMS Training Authorization

LBNL Trip #

NEXT

Begin Date: 12/01/2010

End Date: 12/07/2010

Trip Type: Foreign

Business Purpose: Conference

## Trip Description and Benefit

## Trip Comments

Trip benefit should be a minimum 230 characters not to exceed 1000 characters.

**Provide Program Manager Info**

**Paid by Others Info**

**Any trip related comments for Division Approver or Travel**



# Foreign Authorizations in TREX

Will the salary be paid from the same project number? If no, please provide a salary project ID.	<input type="radio"/> No <input checked="" type="radio"/> Yes	Project ID <input type="text"/>
Are you using WFO Crada or Royalty funds?	<input checked="" type="radio"/> No <input type="radio"/> Yes	
Justification statement for delayed submission,if applicable	<input type="text"/>	
Are you taking DOE or Lab owned Electronic Media Equipment ?	<input type="radio"/> No <input checked="" type="radio"/> Yes	

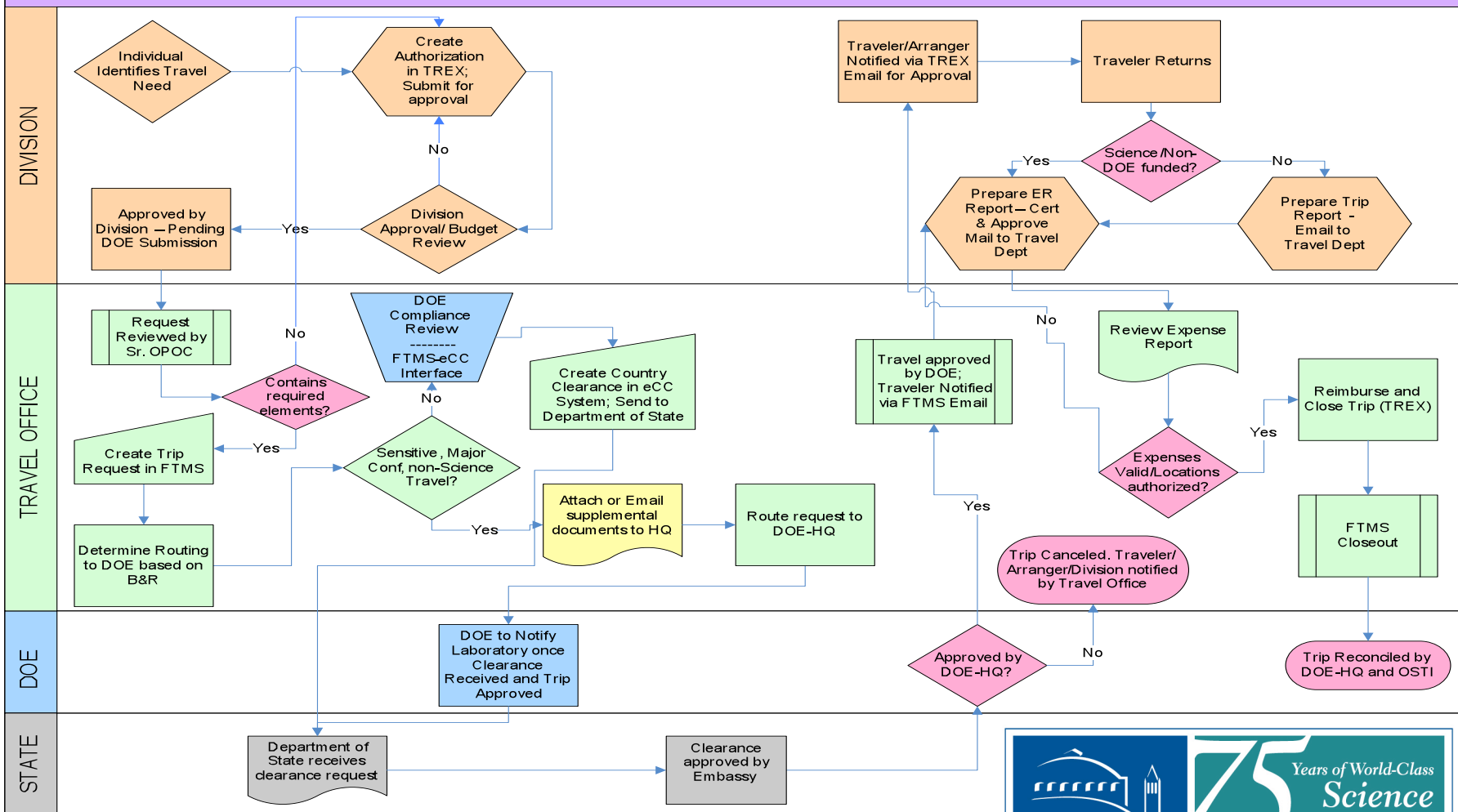
Example of Electronic Media Equipment are Laptops, external hard drives, blackberries, pen drives/memory stick CRYPTOcards, PDAs, portable printers, digital cameras, cell phones, security equipment, radiation detection equipment, power tools, power supplies/converters/transformers, water equipments etc.

DOE Mandate For All Foreign Travel : Disclosure Of All Lab Owned Electronic Media Equip				
Customize   Find   1 of 1   First   Last				
	DOE Equipment Id	Description	Property ID	
1	<input type="text"/>		<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>



# Foreign Travel Approval Process

## FOREIGN TRAVEL APPROVAL PROCESS (CURRENT)



LAWRENCE BERKELEY NATIONAL LABORATORY



# US Department of State

Please provide Travel Services with a copy of the airline itinerary for all foreign travel requests which include:

Singapore  
Germany  
New Zealand

China  
Chile  
Russia

- Name of airline
- Flight Numbers
- Departure point (including date/time)
- Arrival point (including date/time)
- *This also includes connecting flights in any of the locations above which are in excess of 6 hours.*

All travel arrangements for locations above are to be forwarded to [EWalker@lbl.gov](mailto:EWalker@lbl.gov) & cc: [TravelPolicy@lbl.gov](mailto:TravelPolicy@lbl.gov)



# US Department of State

Please provide Travel Services with detailed hotel information for all foreign travel requests which include:

**New Zealand**

**Russia\***

**Chile**

- **Name of Hotel**
- **Phone number**
- **Lodging dates**
- **Address**
- **Confirmation**

All travel arrangements for locations above are to be forwarded to [EWalker@lbl.gov](mailto:EWalker@lbl.gov) & cc: [TravelPolicy@lbl.gov](mailto:TravelPolicy@lbl.gov)

- **\*If lodging location is not on DOE-M list**



# Vacation Guidance

## Vacation Guidelines for EERE, FE, and OE:

1. Case-by-case approval by approving DAS/official;
2. Maximum 1-week for any trip of a 7-14 day duration;
3. For trips < than one week, 1-2 days maximum; and
4. All subject to traveler having sufficient leave balance

## Vacation Guidelines for SC (including WFO):

1. Travelers are permitted (1) day vacation for (1) day of business. This does not include non-working weekend days.

## Vacation Guidelines for NNSA:

1. Personal time must be pre-approved by DOE Program manager. Typically (1) day vacation for (3) days of business.



# Revisions and Cancellations

- Please notify [Ewalker@lbl.gov](mailto:Ewalker@lbl.gov) and cc: [TravelPolicy@lbl.gov](mailto:TravelPolicy@lbl.gov) with ANY changes or cancellation of foreign trip.
- Project ID cannot be changed once authorization has been DOE Approved; Resource adjustment will be required once approved.
- What changes will require DOE approval?
  - Project ID (if B&R code is different)
  - Adding new a country
  - Date changes in excess of +/- 3 days
  - Expenses exceed authorization estimates by 25%
  - Excessive vacation or vacation which was not pre-approved





# Trip Reports and Abstracts

- The post-travel trip report is required for foreign travel when salary and/or travel expenses are funded from DOE. The trip report should be submitted to the Travel Department within 30 days after the completion of travel.
- What is an abstract?
  - Major highlights, benefits of travel, and results of meetings and/or experiments.
- Foreign Trip Report Guidance
  - [http://travel.lbl.gov/foreign/foreign\\_tripreports.html](http://travel.lbl.gov/foreign/foreign_tripreports.html)



# Travel Resources

- **Travel Services Webpage**
  - <http://travel.lbl.gov>
- **Foreign Travel Information Center**
  - <https://commons.lbl.gov/x/e4CCAQ>
- **Foreign Travel**
  - Elijah Walker – 495.2483
  - Lonnette Robinson – 486.5403
- **Travel Services**
  - 486.4500

